



**Criminal Justice Law Enforcement  
Automated Data Services**

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# **NCID-NG User Administration**



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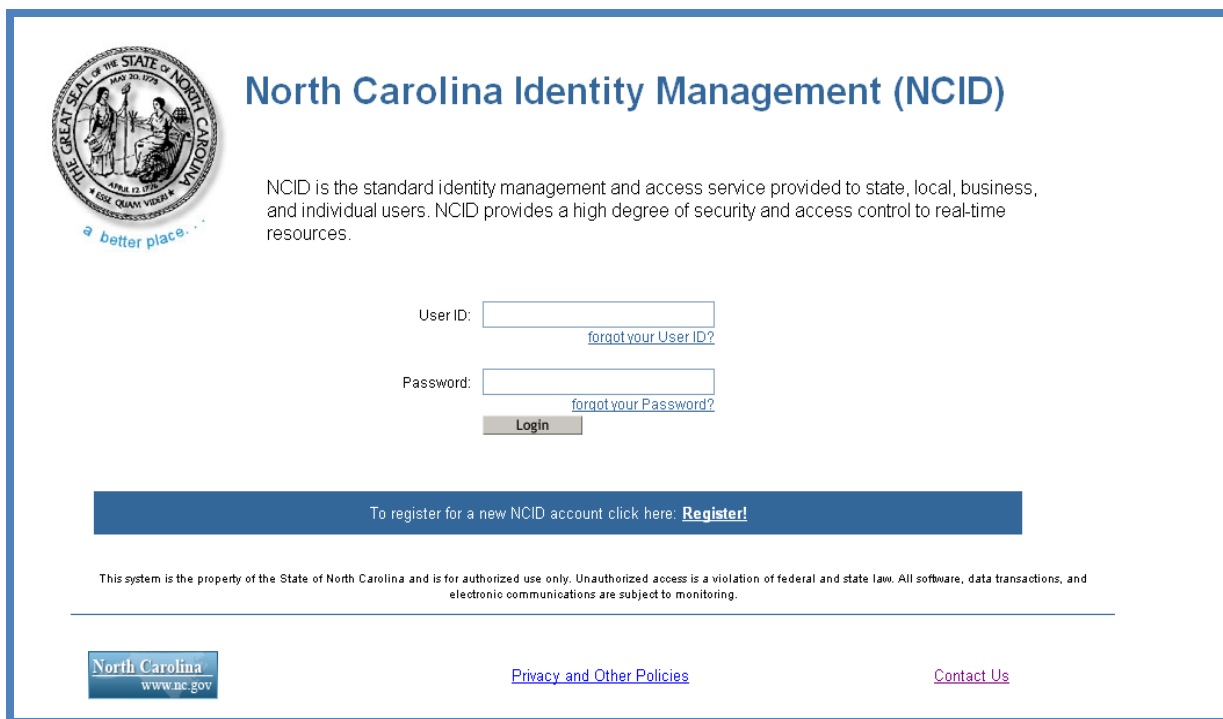
## Introduction

The **North Carolina Identity Management Service – Next Generation (NCID-NG)** is the standard identity and access management platform provided by the Office of Information and Technology Services. NCID-NG is a Web-based application that provides a secure environment for state agency, local government, business and individual users to log in and gain access to real-time resources, such as customer-based applications.

CJLEADS is leveraging NCID's authentication capabilities to ensure that the CJLEADS application is secure. The NCID username and password will be used to access CJLEADS. This document will provide administrators basic instructions for using NCID.

## Logging In

Administrators can access the NCID login page at: <https://ncid.nc.gov>



The screenshot shows the NCID login page. On the left is the Great Seal of the State of North Carolina with the motto "a better place...". To the right of the seal is the title "North Carolina Identity Management (NCID)". Below the title is a description: "NCID is the standard identity management and access service provided to state, local, business, and individual users. NCID provides a high degree of security and access control to real-time resources." The login section contains two input fields: "User ID:" and "Password:". Below the "User ID:" field is a link "forgot your User ID?". Below the "Password:" field is a link "forgot your Password?". A "Login" button is positioned below the password field. A blue banner below the login fields contains the text "To register for a new NCID account click here: [Register!](#)". At the bottom of the page, there is a disclaimer: "This system is the property of the State of North Carolina and is for authorized use only. Unauthorized access is a violation of federal and state law. All software, data transactions, and electronic communications are subject to monitoring." Below the disclaimer are three links: "North Carolina www.nc.gov", "Privacy and Other Policies", and "Contact Us".

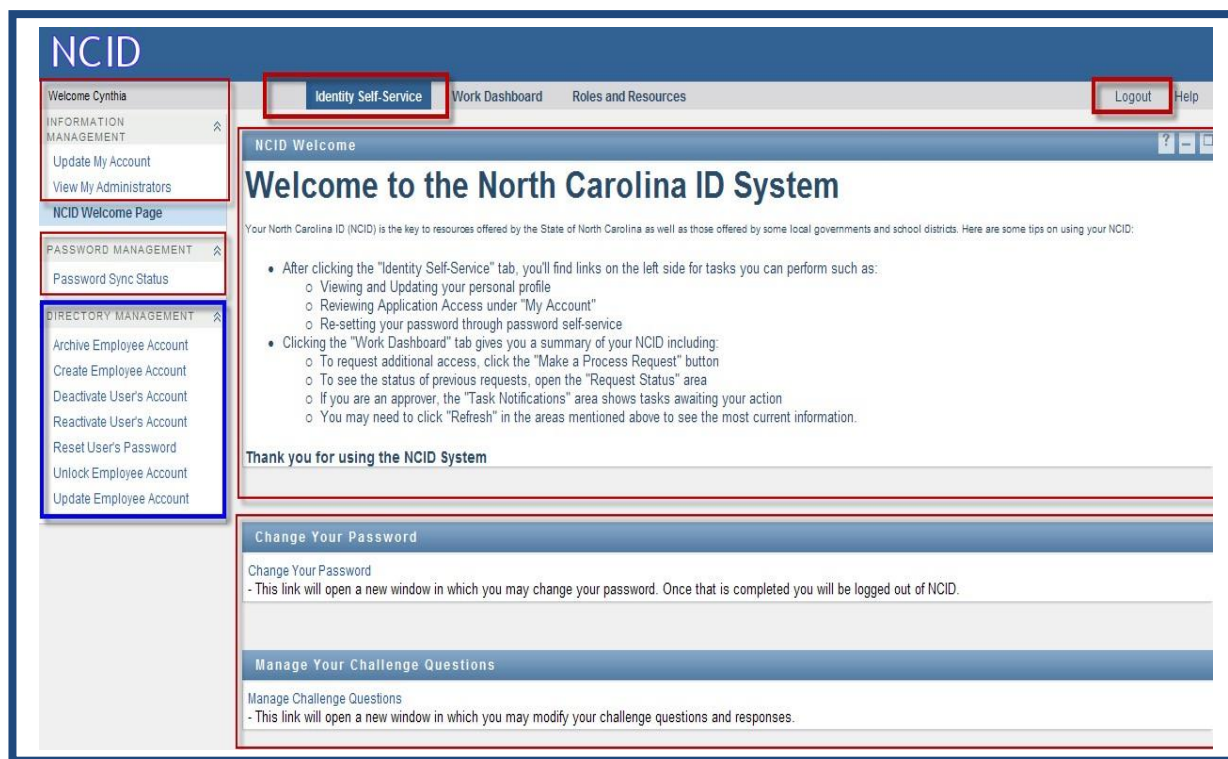
Administrators should already have an NCID. If not, you will need to contact a delegated administrator for your agency to create an account for you. If you do not have a delegated administrator contact ITS at 919 754-6000 or 1-800-800-722-3946. The delegated administrator will also need to promote your account to delegated administrator for your agency, division or section.

Type the **username**.

Type the **password**.

Click **Login**.

The *Welcome to NCID* screen opens.



After logging in to NCID-NG, all users are greeted with the main screen. The delegated administrator screen displays a welcome message, quick tips to help you get started, end user self service tools and a directory management section with links to manage end user accounts.

## Managing User Accounts

Administrators manage user accounts from either the “Identity Self-Service” tab or from the “Work Dashboard” tab. The Identity Self-Service tab displays links to the most commonly used process requests; whereas the Work Dashboard tab provides access to every request that is available to you.

**Note:** (screen content and feature availability will vary based on job responsibility and access permissions).

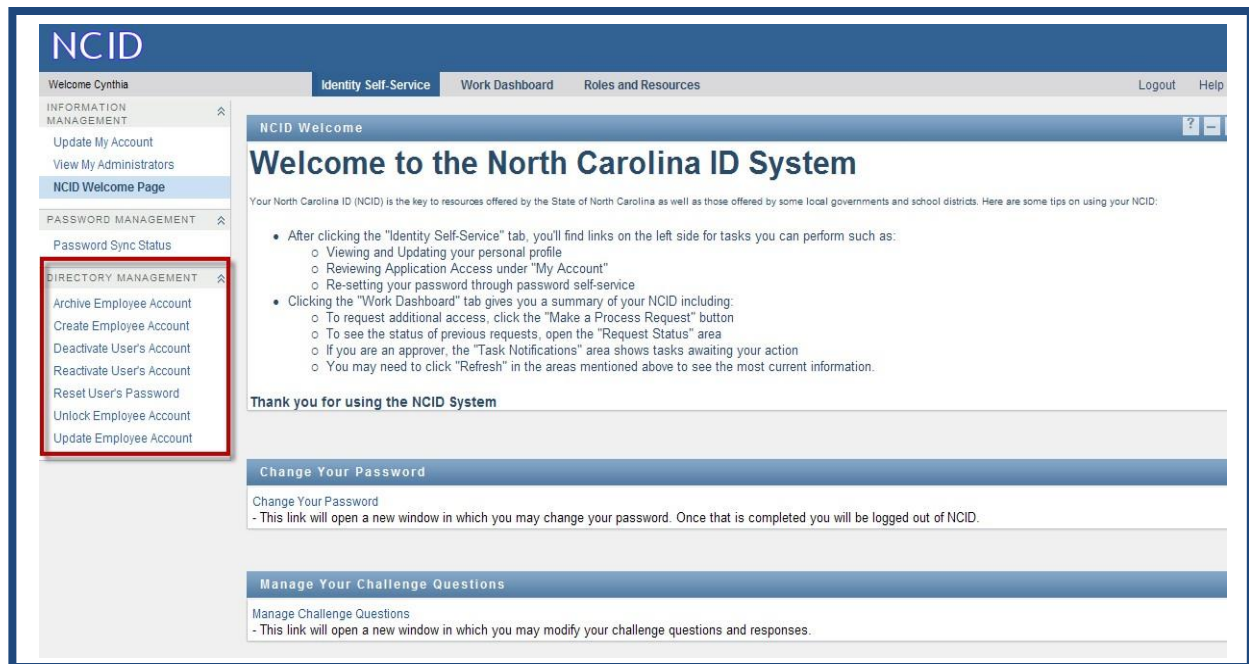
### Self Service Tools:

- Identity Self-Service tab - *shows user self-help tools.*
- Update My Account allows user profile edits.
- Password Sync Status shows success/failure of Password Sync to applications.
- Change Password link
- Manage Challenge Questions link
- Logout link

### Delegated Administrator Tool – basic tools to manage accounts

- Activate Employee Account
- Create Employee Account
- Deactivate Employee Account

Reactivate Employee Account  
Unlock Employee Account  
Update Employee Account



## Searching for Users:

The Search feature is common across all process request forms. The Administrator will need to select the appropriate process request from the Identity Self-Service tab or Work Dashboard tab, and then look up the account by using the Search feature found on the form. The following figure illustrates an example of the "User Search Criteria" section displayed on the "Update Employee Account" request form.



1. Click **Update Employee Account** link in the Directory Management section.  
*Form detail screen displays.*

Update Employee Account

Complete resource request.  
\* - indicates required.

Resource:

Update Employee Account

Recipient:

Cynthia Mitchell

Process Request Category:

Accounts

Description:

Update an employee's account

Form Detail

Delegated Admin Info:

DA of Organization(s): None

DA of Division(s): CJLEADS

DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.

User Search Criteria

Last Name:

Contains

First Name:

Equals

User ID:

Contains

Email:

Equals

Beacon No.:

Equals

Click to search:

The **User Search Criteria** section provides five (5) user attribute fields to help you retrieve an account. You can search by one field or you can perform multiple field searches.

Last Name  
First Name  
User ID  
Email  
Beacon Number

The dropdown menus provide four (4) characteristics to perform a match type.

Contains  
Equals  
Ends With  
Starts With

Update Employee Account

Complete resource request.  
\* - Indicates required.

Resource:

Update Employee Account

Recipient:

Cynthia Mitchell

Process Request Category:

Accounts

Description:

Update an employee's account

Form Detail

Delegated Admin Info:

DA of Organization(s):

None

DA of Division(s):

CJLEADS

DA of Section(s):

None

Enter search criteria in the boxes below then click the search icon.

User Search Criteria

Last Name:

Contains

Porter

First Name:

Equals

John

User ID:

Contains

Email:

Equals

Beacon No.:

Equals

Click to search:

- Type the user information to search for in the appropriate fields.
- Select appropriate **match type** from dropdown menus.

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
John J Porter	jjporter	cynthiamitchell19@yahoo.com	State Employee	Office of the State Controller	Active

- Click **Search**.  
The *Object Lookup* results screen displays user account to update.

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
John J Porter	jjporter	cynthiamitchell19@yahoo.com	State Employee	Office of the State Controller	Active

Click row to select.

5. **Click** the selected user account.  
The *Form Details* screen displays with demographic information stored in the user's profile
6. **View** or **Update** the user's profile.

Enter search criteria in the boxes below then click the search icon.

**User Search Criteria**


Last Name:  Porter

First Name:  John

User ID:  J

Email:

Beacon No.:

Click to search: 

**Demographic Info**

Prefix:

First Name:

Last Name:

Full Name:

Middle Initial:

Suffix:

**Contact Info**

Address Line 1:

Address Line 2:

City:

State:

Zip Code:

Email:

Confirm Email:

Business Telephone:

Ext:

**Account Info**

The User ID field may only contain the characters: [A-Z] [0-9] hyphen period underscore

User ID:

User Type:

Employee Type:

Account Expiration:

Password Expiration:

Password Policy Type:

Account Status:

Organization:

Division:

Section:

Last Password Reset:

**Administrative Roles**

None

**Application Info**

None

Update Account Cancel



7. Click **Update Account** if modifying user demographic information or
8. Click **Cancel** to clear screen.

## Creating New Accounts

Administrators are responsible for creating all new user accounts in NCID-NG.



1. Click Create **Employee Account** link in the **Directory Management** section.  
*The Create Employee Account form displays.*

Create Employee Account

Complete resource request.  
\* - Indicates required.

Resource:

Create Employee Account

Recipient:

Cynthia Mitchell

Process Request Category:

Accounts

Description:

Create Employee Account

Form Detail

Delegated Admin Info:

DA of Organization(s):

None

DA of Division(s):

CJLEADS

DA of Section(s):

None

Employee Info

Prefix:

Mr.

First Name: \*

Charlie

Middle Initial:

W

Last Name: \*

Trainer

Suffix:

Click here

Full Name:

Charlie W Trainer

Contact Info

Address Line 1:

3514 Bush Street

Address Line 2:

City:

Raleigh

State:

NC

Zip Code:

27609

Email: \*

cynthiamitchell@yahoo.com

Confirm Email:

cynthiamitchell@yahoo.com

Business Telephone: \*

919-431-6505

Ext:

Account Info

User Type:

State Employee

Organization: \*

Office of the State Controller

Employee Type: \*

Full Time

Division: \*

CJLEADS

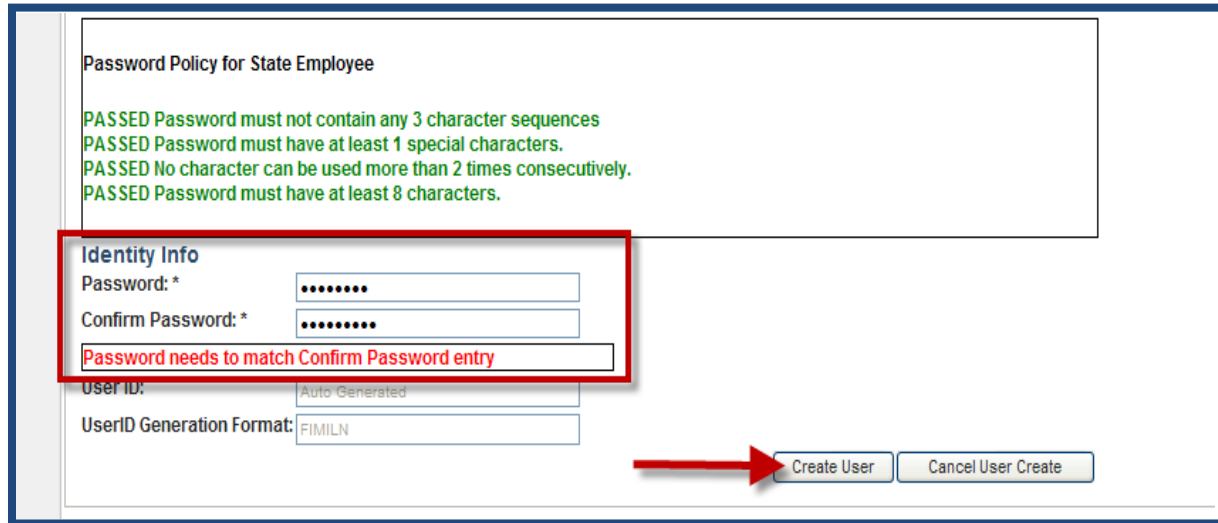
Status:

Active

Section:

Account Expiration:

- Fill in all of the required fields (marked with an \*).



Password Policy for State Employee

PASSED Password must not contain any 3 character sequences  
 PASSED Password must have at least 1 special characters.  
 PASSED No character can be used more than 2 times consecutively.  
 PASSED Password must have at least 8 characters.

**Identity Info**

Password: \*

Confirm Password: \*

Password needs to match Confirm Password entry

User ID:

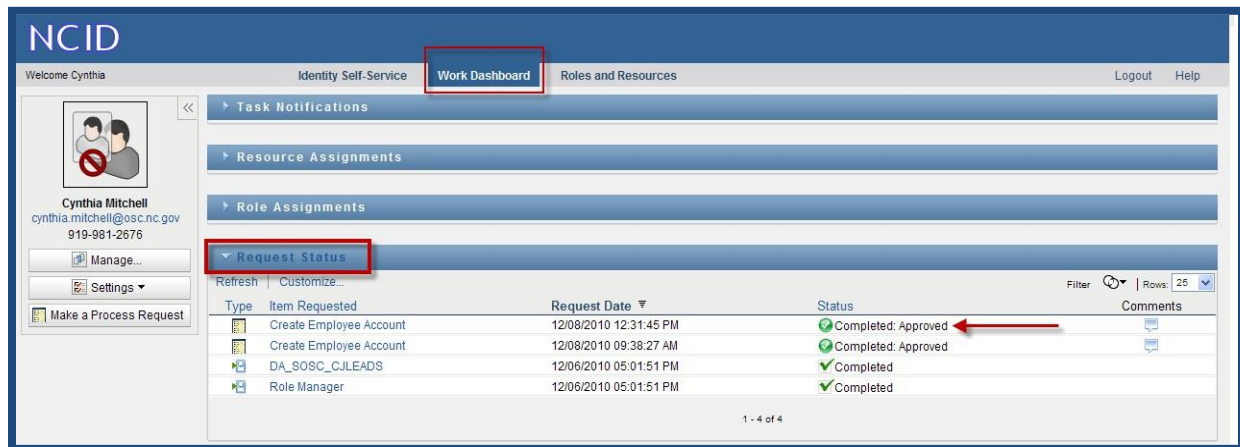
User ID Generation Format:

[Create User](#) [Cancel User Create](#)



If password meets password policy criteria, password policy message will change from red to green.

- Create one-time temporary password.
- Click **Create User** to finish.



NCID

Welcome Cynthia

Identity Self-Service **Work Dashboard** Roles and Resources Logout Help

Task Notifications

Resource Assignments

Role Assignments

**Request Status**

Refresh Customize...

Type	Item Requested	Request Date	Status	Comments
Create Employee Account	Create Employee Account	12/08/2010 12:31:45 PM	Completed: Approved	
Create Employee Account	Create Employee Account	12/08/2010 09:38:27 AM	Completed: Approved	
DA_SOSC_CJLEADS	DA_SOSC_CJLEADS	12/06/2010 05:01:51 PM	Completed	
Role Manager	Role Manager	12/06/2010 05:01:51 PM	Completed	

1 - 4 of 4

To confirm account creation status completed.

- Click on **Work Dashboard**.
- Click **Request Status**.  
 The *Item Request* screen will display with account status listing as *Completed*.



The administrator must notify user that account was created and provide one-time temporary password to login to NCID. The user must perform the following actions upon logging in NCID for the first time:

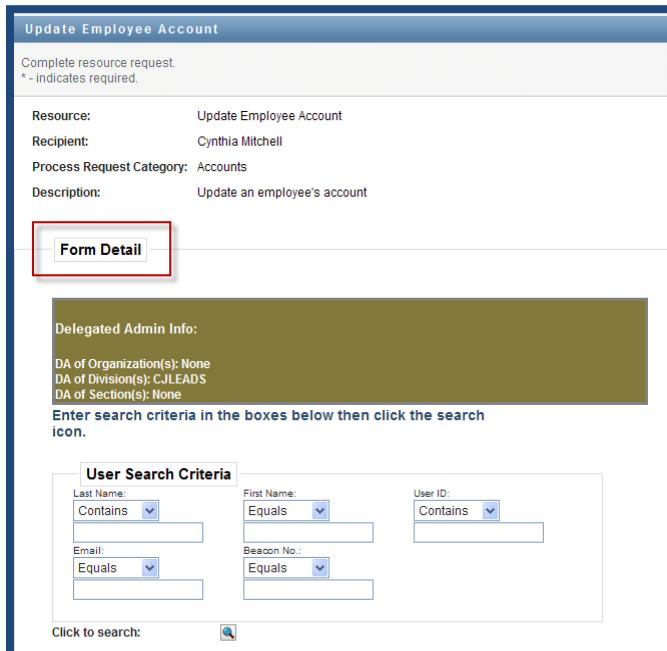
- Change password**
- Set up challenge questions and responses**
- Log back into NCID.**

### ***Updating Employee Accounts***

The Updating Employee Accounts link is used to modify user account information. The Administrator will need to search for the account to be modified. Values which appear as read-only text may not be modified.



1. Click **Update Employee Account** link in the Directory Management section.  
*Form Detail* screen displays.



**Update Employee Account**

Complete resource request  
\* - Indicates required.

Resource: Update Employee Account  
Recipient: Cynthia Mitchell  
Process Request Category: Accounts  
Description: Update an employee's account

**Form Detail**


Delegated Admin Info:

DA of Organization(s): None  
DA of Division(s): CJLEADS  
DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.

**User Search Criteria**

Last Name: Contains [ ]  
First Name: Equals [ ]  
User ID: Contains [ ]  
Email: Equals [ ]  
Beacon No.: Equals [ ]

Click to search: 

2. Type the user information to search for in the appropriate fields to retrieve account information.

Update Employee Account

Complete resource request.  
\* - indicates required.

Resource:

Update Employee Account

Recipient:

Cynthia Mitchell

Process Request Category:

Accounts

Description:

Update an employee's account

Form Detail

Delegated Admin Info:

DA of Organization(s):

None

DA of Division(s):

CJLEADS

DA of Section(s):

None

Enter search criteria in the boxes below then click the search icon.

User Search Criteria

Last Name:

Contains

Porter

First Name:

Equals

John

User ID:

Contains

Email:

Equals

Beacon No.:

Equals

Click to search:

3. Select appropriate **match type** from dropdown menus.

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
John J Porter	jjporter	cynthiamitchell19@yahoo.com	State Employee	Office of the State Controller	Active

4. Click **Search**  
The *Object Lookup* results screen displays user to be updated.

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
John J Porter	jporter	cynthiamitchell19@yahoo.com	State Employee	Office of the State Controller	Active

Click row to select.

- Click the selected user account.  
The *Form Details* screen displays with demographic information stored in the user's profile.
- View or Update the user's account profile.

Enter search criteria in the boxes below then click the search icon.

**User Search Criteria**

Last Name: Contains Porter  
First Name: Equals John  
User ID: Contains J  
Email: Equals  
Beacon No.: Equals

Click to search:

**Demographic Info**

Prefix: Mr.  
First Name: \* John  
Last Name: \* Porter  
Full Name: John J Porter  
Middle Initial: J  
Suffix:

**Contact Info**

Address Line 1: 3514 Bush Street  
Address Line 2:  
City: Raleigh  
State: NC  
Zip Code: 27609  
Email: \* cynthiamitchell19@yahoo.com  
Confirm Email: cynthiamitchell19@yahoo.com  
Business Telephone: 919-431-6505  
Ext:

**Account Info**

The User ID field may only contain the characters: [A-Z] [0-9] hyphen period underscore

User ID: \* jporter  
User Type: State Employee  
Employee Type: \* Full Time  
Account Expiration:  
Password Expiration: 12/08/2010 09:38:30 AM  
Password Policy Type: Normal User  
Account Status: ACTIVE  
Organization: \* Office of the State Controller  
Division: \* CJLEADS  
Section:  
Last Password Reset: 09/09/2010 10:38:30 AM

**Administrative Roles**

None

**Application Info**

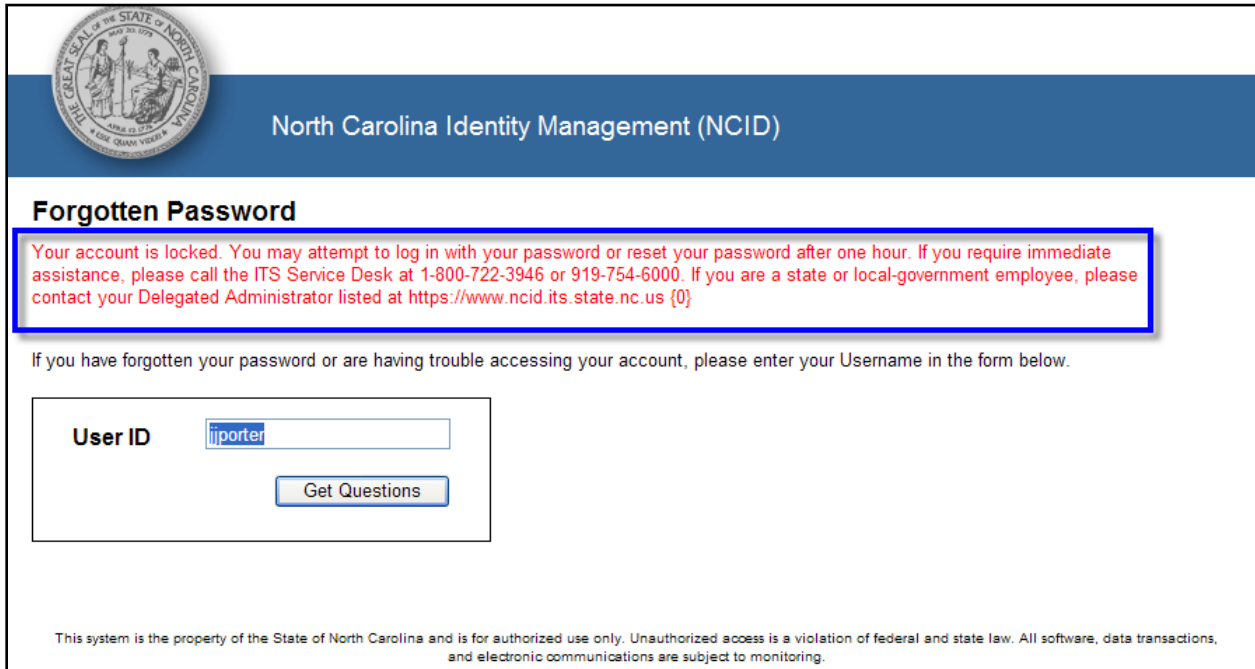
None

Update Account Cancel

- Click **Update Account**  
The user's account information has been updated.

8. Click **Cancel** to clear screen.

## Unlocking User Accounts



**North Carolina Identity Management (NCID)**

### Forgotten Password

Your account is locked. You may attempt to log in with your password or reset your password after one hour. If you require immediate assistance, please call the ITS Service Desk at 1-800-722-3946 or 919-754-6000. If you are a state or local-government employee, please contact your Delegated Administrator listed at [{0}](https://www.ncid.its.state.nc.us)

If you have forgotten your password or are having trouble accessing your account, please enter your Username in the form below.

User ID

This system is the property of the State of North Carolina and is for authorized use only. Unauthorized access is a violation of federal and state law. All software, data transactions, and electronic communications are subject to monitoring.

When a user attempts to access a NCID protected application and fails three (3) times in a row, the user's account will be locked. The user account will automatically unlock after **one (1) hour** from the time it was locked. However, if the user requires immediate assistance, the administrator can manually unlock the account before the lockout period expires.



**DIRECTORY MANAGEMENT**

- Archive Employee Account
- Create Employee Account
- Deactivate User's Account
- Reactivate User's Account
- Reset User's Password
- Unlock Employee Account**
- Update Employee Account

1. Click **Unlock Employee Account**.  
The *Unlock Employee Account* request form displays.

## Unlock Employee Account

Complete resource request.  
\* - indicates required.

Resource: Unlock Employee Account

Recipient: Cynthia Mitchell

Process Request Category: Accounts

Description: Unlock an employee's account

### Form Detail

#### Delegated Admin Info:

DA of Organization(s): None  
DA of Division(s): CJLEADS  
DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.

#### User Search Criteria

Last Name:

Contains

Porter

Email:

Equals

First Name:

Equals


John

Beacon No.:

Equals

User ID:

Contains

Click to search: 

- Select appropriate criteria to search for the user's account that needs to be unlocked.

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
John J Porter	jjporter	cynthiamitchell19@yahoo.com	State Employee	Office of the State Controller	Active

- Click **Search**.  
The *Object Lookup* screen displays user account to be unlocked.

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
John J Porter	jjporter	cynthiamitchell19@yahoo.com	State Employee	Office of the State Controller	Active

Click row to select.

- Select user account.  
Selected *User's Account Detail* form displays. Under *User Search Results* the status field should indicate user account as **"Locked"**.

**Unlock Employee Account**

Complete resource request.  
\* - indicates required.

Resource: Unlock Employee Account  
Recipient: Cynthia Mitchell  
Process Request Category: Accounts  
Description: Unlock an employee's account

**Form Detail**


**Delegated Admin Info:**

DA of Organization(s): None  
DA of Division(s): CJLEADS  
DA of Section(s): None


Enter search criteria in the boxes below then click the search icon.

**User Search Criteria**

Last Name: Contains   
Email: Equals   
First Name: Equals   
Beacon No.: Equals   
User ID: Contains

Click to search: 

**User Search Result**

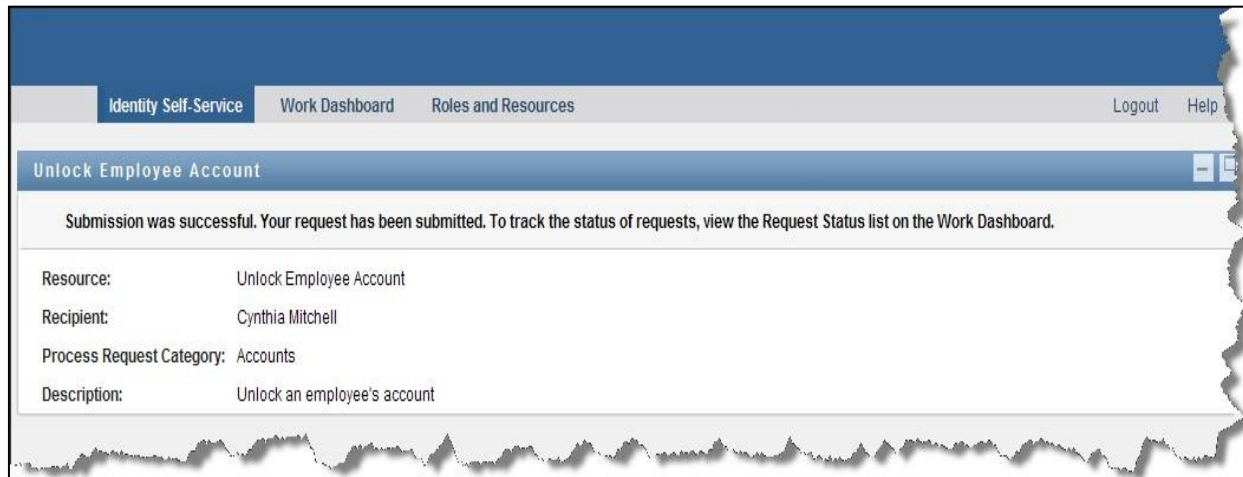
Full Name: John J Porter  
User ID: jjporter  
Email: cynthiamitchell19@yahoo.com  
Beacon ID:  
Status: **LOCKED** 



5. Click **Unlock**.

A confirmation message displays that your request was successful.

To track the status of request, view the request status list on the Work Dashboard.



## Recovering a User ID

Occasionally users will need to recover their user ID. If a user cannot remember his or her user ID, then the administrator should direct the user to the **'Forgot Your User ID?'** link on the login page to perform a user ID recovery search. The Administrator can also recover the user ID by accessing the Update Employee Account link. Please refer to "Updating Employee Account" on page ( ) of this document.



**The User ID displays in the User ID field in the Account Info section on the Update Employee Account form.**

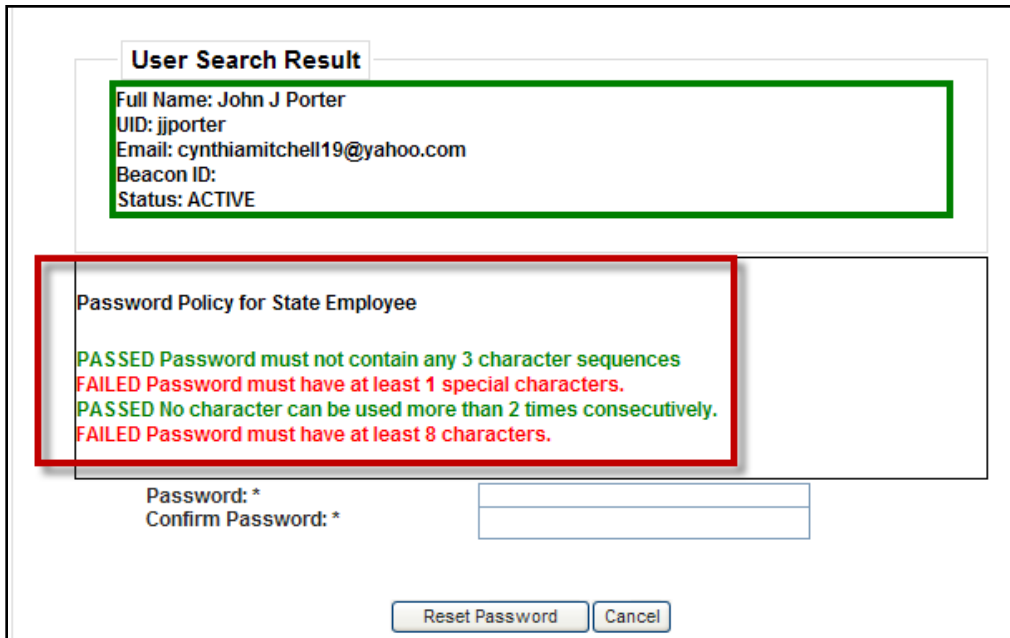


## Resetting User Passwords

Occasionally users will need to have a password reset performed. Ensure that the user has attempted and failed to reset the password first using the „Forgot Your Password?“ link on the login page. If the user is not able to answer the questions correctly, then an administrator will need to reset the user's password. This feature is unavailable to employees who have recently changed their password (within 15 days), or if their account is locked



1. Click **Reset Employees' Password**.  
The *Reset Employee Password request* form displays.



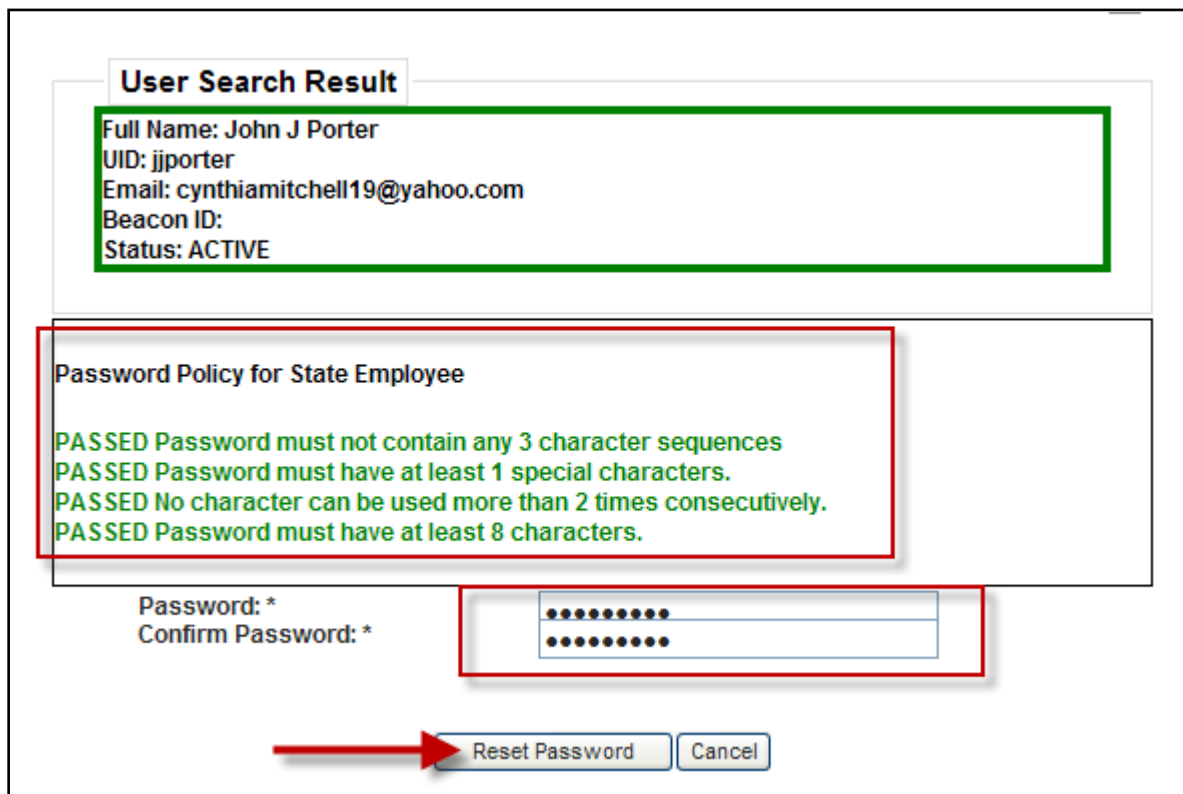
A screenshot of the 'User Search Result' form. The form contains the following elements:

- User Search Result** (Section Header)
- User Information:**
  - Full Name: John J Porter
  - UID: jjporter
  - Email: cynthiamitchell19@yahoo.com
  - Beacon ID:
  - Status: ACTIVE
- Password Policy for State Employee:**
  - PASSED Password must not contain any 3 character sequences
  - FAILED Password must have at least 1 special characters.
  - PASSED No character can be used more than 2 times consecutively.
  - FAILED Password must have at least 8 characters.
- Input Fields:**
  - Password: \*
  - Confirm Password: \*
- Buttons:**
  - Reset Password
  - Cancel

- Select appropriate criteria and search for the user account that needs to be reset.  
Selected user account details and *Password Policy Box* are displayed.



As you type the password, each requirement turns from red to green and the word "Passed" is displayed to indicate that the password meets the policy criteria.



**User Search Result**

Full Name: John J Porter  
 UID: jjporter  
 Email: cynthiamitchell19@yahoo.com  
 Beacon ID:  
 Status: ACTIVE

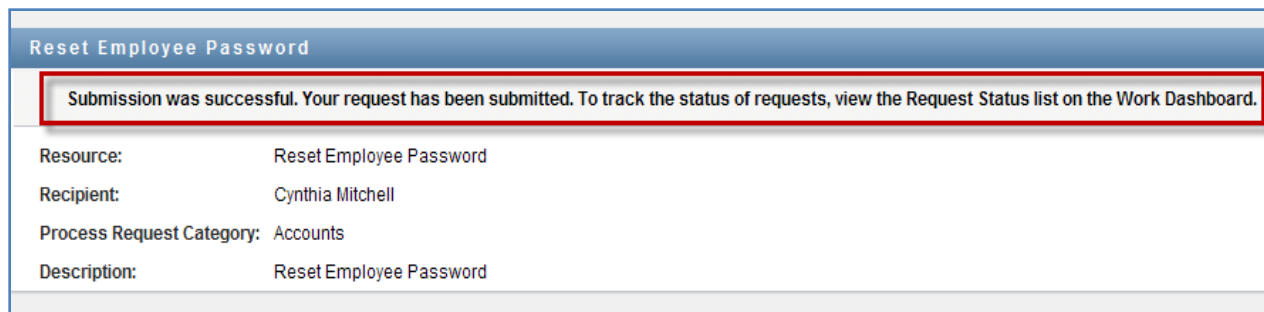
**Password Policy for State Employee**

PASSED Password must not contain any 3 character sequences  
 PASSED Password must have at least 1 special characters.  
 PASSED No character can be used more than 2 times consecutively.  
 PASSED Password must have at least 8 characters.

Password: \*  
 Confirm Password: \*

**Reset Password** **Cancel**

- Enter **temporary password** in Password field.
- Re-enter **temporary password** in Confirm Password field.
- Click **Reset Password**.  
A confirmation message displays that your request was successful.



**Reset Employee Password**

Submission was successful. Your request has been submitted. To track the status of requests, view the Request Status list on the Work Dashboard.

Resource:	Reset Employee Password
Recipient:	Cynthia Mitchell
Process Request Category:	Accounts
Description:	Reset Employee Password

6. Contact the user via telephone with the new password.



The user will need this password once to login to the NCID login page to reset their password.

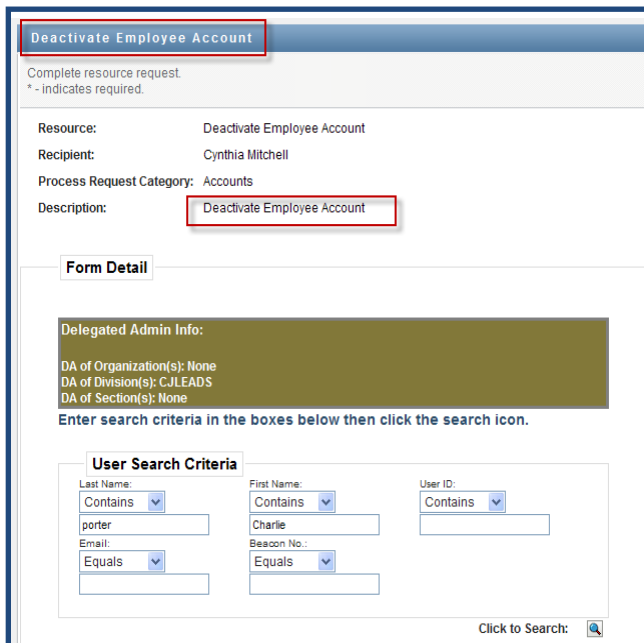
## Deactivating User Accounts

If a user is temporarily or permanently leaving an agency the user's NCID account needs to be deactivated. Deactivation suspends the user's rights or associations so that the user will be unable to log in to NCID-NG or any connected applications. The Administrator can deactivate a user account without deleting or removing the account completely from the system. Deactivated accounts can be reactivated if a user needs to regain access to NCID or any connected applications. A deactivated account may also be archived if the user permanently leaving the agency.



1. **Deactivate Employee Account.**

The *Deactivate Employee Account* form displays.



**Deactivate Employee Account**

Complete resource request.  
\* - Indicates required.

Resource: Deactivate Employee Account  
Recipient: Cynthia Mitchell  
Process Request Category: Accounts  
Description: Deactivate Employee Account

**Form Detail**


**Delegated Admin Info:**

DA of Organization(s): None  
DA of Division(s): CJLEADS  
DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.

**User Search Criteria**

Last Name: Contains [porter]  
First Name: Contains [Charlie]  
User ID: Contains [ ]  
Email: Equals [ ]  
Beacon No.: Equals [ ]

Click to Search: 

**Form Detail**


**Delegated Admin Info:**

DA of Organization(s): None  
 DA of Division(s): CJLEADS  
 DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.


**User Search Criteria**

Last Name: Contains   
 First Name: Contains   
 User ID: Contains   
 Email: Equals   
 Beacon No.: Equals

Click to Search: 

**User Search Result**

Full Name: Charlie W Porter  
 UID: cwporter  
 Email: cynthiamitchell@yahoo.com  
 Beacon ID:



2. Search for the user account using the steps outlined previously in this document.  
 User's account profile displays.

**Deactivate Employee Account**

Submission was successful. Your request has been submitted. To track the status of requests, view the Request Status list on the Work Dashboard.

Resource: Deactivate Employee Account  
 Recipient: Cynthia Mitchell  
 Process Request Category: Accounts  
 Description: Deactivate Employee Account

3. Click **Deactivate**.  
 A confirmation message displays that your request was successful.

## Reactivating User Accounts

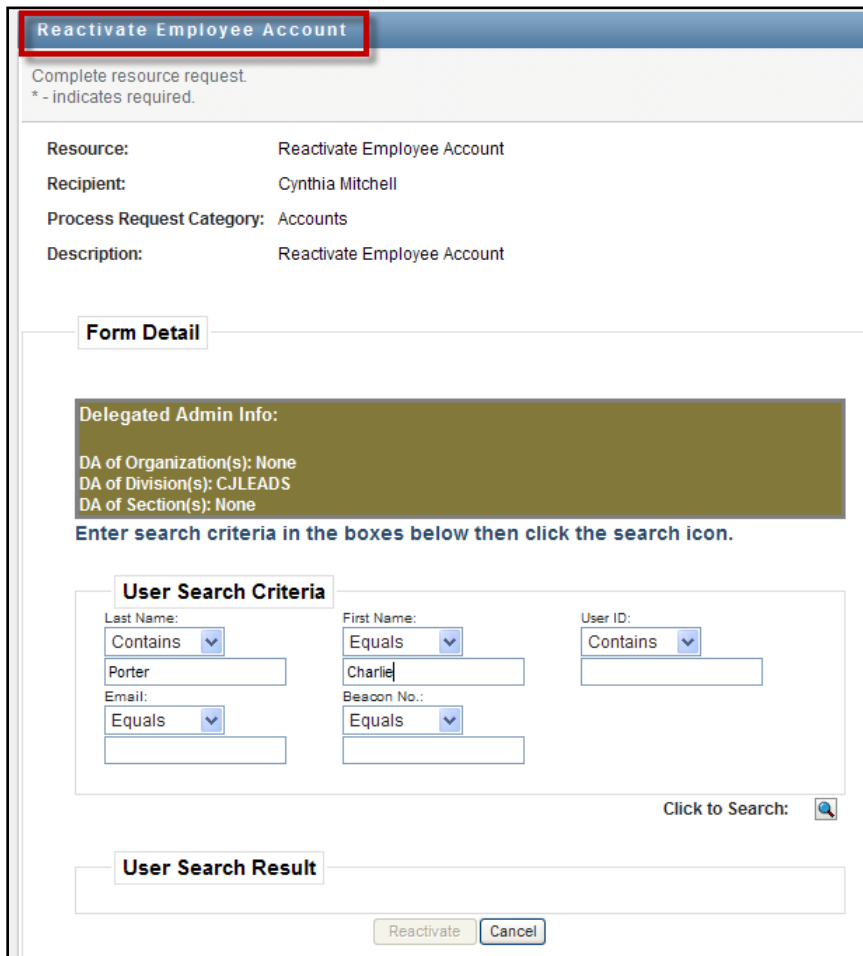
After a user account is deactivated, it is sometimes necessary to reactivate the account. For example, an account can be reactivated for an employee who returns to work after taking a temporary leave of absence. The steps listed below outline the reactivation process.



If a state employee contractor is reactivated, the system will automatically add 30 days from the current date as the new account expiration date. You may change this value in the user's account by specifying a different date in the "Account Expiration" field.



1. Click **Reactive Employee Account**.  
The *Reactivate Employee Account* form displays.



**Reactivate Employee Account**

Complete resource request.  
\* - indicates required.

Resource: Reactivate Employee Account  
Recipient: Cynthia Mitchell  
Process Request Category: Accounts  
Description: Reactivate Employee Account

**Form Detail**


**Delegated Admin Info:**

DA of Organization(s): None  
DA of Division(s): CJLEADS  
DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.

**User Search Criteria**

Last Name: Contains Porter	First Name: Equals Charlie	User ID: Contains
Email: Equals	Beacon No.: Equals	

Click to Search: 

**User Search Result**

Reactivate Cancel

- Search for the user account using the steps outlined previously in this document.  
The *Object Lookup* screen displays a list of *deactivated user accounts*.

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
Charlie W Porter	cwporter	cynthiamitchell@yahoo.com	State Employee	Office of the State Controller	Disabled

- Select user account to be reactivated.

**Form Detail**


**Delegated Admin Info:**

DA of Organization(s): None  
DA of Division(s): CJLEADS  
DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.


**User Search Criteria**

Last Name: Contains Porter  
First Name: Equals Charlie  
User ID: Contains  
Email: Equals  
Beacon No.: Equals

Click to Search: 

**User Search Result**

Full Name: Charlie W Porter  
UID: cwporter  
Email: cynthiamitchell@yahoo.com  
Beacon ID:

 Reactivate Cancel

- Click **Reactivate**.  
A confirmation message displays that your request was successful.

Reactivate Employee Account	
Submission was successful. Your request has been submitted. To track the status of requests, view the Request Status list on the Work Dashboard.	
Resource:	Reactivate Employee Account
Recipient:	Cynthia Mitchell
Process Request Category:	Accounts
Description:	Reactivate Employee Account

The user account is now reactivated. Reactivated accounts should automatically be activated in the CJLEADS application. The CJLEADS User Administrator will now need to verify if the user account is activated and granted access in CJLEADS. If account is not granted access, the CJLEADS Administrator will need to grant user account access to the CJLEADS application.



For information on how to restore and/or revoke CJLEADS access, please refer to the [CJLEADS User Administration](#) document.

## Removing User Accounts

If a user is permanently leaving the agency, the NCID user account needs to be **deactivated** and **archived**. Refer to “Deactivating User Account” previously outlined in this document. Please note that once the account is archived it cannot be reinstated. If the user decides to return to the agency, it will be necessary for the Administrator to create a new account for the user to access NCID-NG and any connected resources again.

1. **Deactivate** user account.



2. Click on **Archive Employee Account**.  
The *Archive Employee Account* form displays.



Archive Employee Account

Complete resource request.  
\* - indicates required.

Resource: Archive Employee Account

Recipient: Cynthia Mitchell

Process Request Category: Accounts

Description: Archive an employee's account

Form Detail

Delegated Admin Info:  
 DA of Organization(s): None  
 DA of Division(s): CJLEADS  
 DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.

User Search Criteria

Last Name:

Contains Porter

Email:

Equals

First Name:

Equals Charlie

Beacon No.:

Equals

User ID:

Contains W

Click to search:

3. Search for the user account using the steps outlined previously in this document.  
The *Object Lookup* screen display list of users to be archived

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
Charlie W Porter	cwporter	cynthiamitchell@yahoo.com	State Employee	Office of the State Controller	Disable

(Click row to select.)

4. Select user account to be **archived**.

**Form Detail**


Delegated Admin Info:

DA of Organization(s): None  
DA of Division(s): CJLEADS  
DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.


**User Search Criteria**

Last Name: Contains   
First Name: Equals   
User ID: Contains   
Email: Equals   
Beacon No.: Equals

Click to search: 

**User Search Result**


Full Name: Charlie W Porter  
User ID: cwporter  
Email: cynthiamitchell@yahoo.com  
Beacon ID:



- Click **Archive**.  
The system will ask for a confirmation

**Windows Internet Explorer**

Are you sure you want to archive this User? Archiving is permanent and can not be undone.



- Click **Ok**.  
A confirmation message displays that your request was successful

Archive Employee Account

Submission was successful. Your request has been submitted. To track the status of requests, view the Request Status list on the Work Dashboard.

Resource:	Archive Employee Account
Recipient:	Cynthia Mitchell
Process Request Category:	Accounts
Description:	Archive an employee's account.


The user account is now archived. Archived user accounts should automatically be removed in the CJLEADS application. The CJLEADS User Administrator will now need to verify account is removed from the CJLEADS Utility Administrator tool.

## Promote Delegated Administrator

It may be necessary to assign a user as an additional administrator to assist with managing agency user accounts or demote a user from that role. The Administrator can promote a user account to delegated administrator by assigning the appropriate administrative role.

NCID

Welcome Cynthia
Identity Self-Service
Work Dashboard
Roles and Resources
Logout
Help



Cynthia Mitchell  
cynthia.mitchell@osc.nc.gov  
919-981-2676

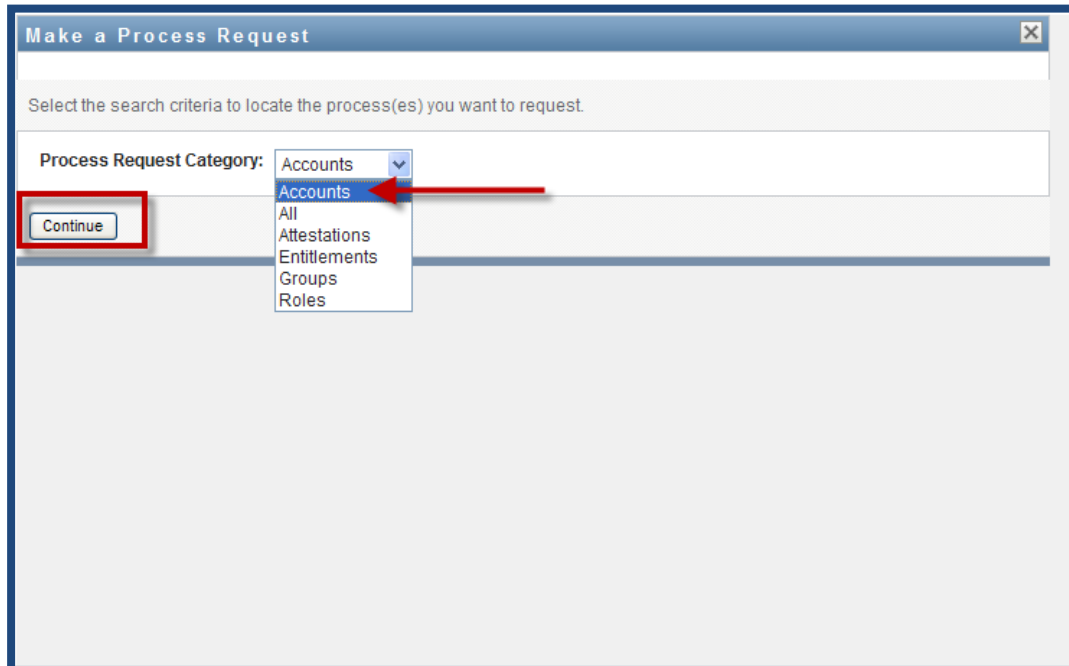
Manage...

Settings ▾

Make a Process Request

Task Notifications
Resource Assignments
Role Assignments
Request Status

1. Click **Work Dashboard** tab.



**Make a Process Request**

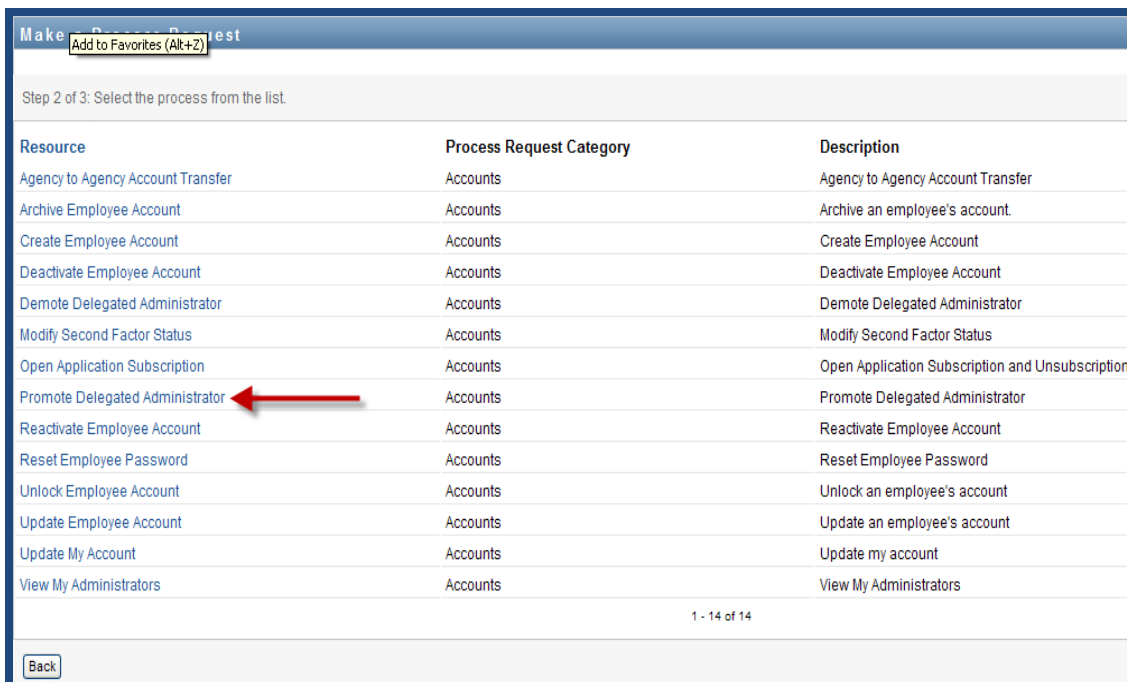
Select the search criteria to locate the process(es) you want to request.

Process Request Category: **Accounts**

**Continue**

Accounts  
All  
Attestations  
Entitlements  
Groups  
Roles

2. Click **Make a Process Request**.
3. Click **Accounts** from the **Process Request Category** dropdown menu.
4. Click **Continue**.  
The *Make A Process Request* screen displays.



**Make a Process Request**

Add to Favorites (Alt+F2)

Step 2 of 3: Select the process from the list.

Resource	Process Request Category	Description
<a href="#">Agency to Agency Account Transfer</a>	Accounts	Agency to Agency Account Transfer
<a href="#">Archive Employee Account</a>	Accounts	Archive an employee's account.
<a href="#">Create Employee Account</a>	Accounts	Create Employee Account
<a href="#">Deactivate Employee Account</a>	Accounts	Deactivate Employee Account
<a href="#">Demote Delegated Administrator</a>	Accounts	Demote Delegated Administrator
<a href="#">Modify Second Factor Status</a>	Accounts	Modify Second Factor Status
<a href="#">Open Application Subscription</a>	Accounts	Open Application Subscription and Unsubscription
<a href="#">Promote Delegated Administrator</a>	Accounts	Promote Delegated Administrator
<a href="#">Reactivate Employee Account</a>	Accounts	Reactivate Employee Account
<a href="#">Reset Employee Password</a>	Accounts	Reset Employee Password
<a href="#">Unlock Employee Account</a>	Accounts	Unlock an employee's account
<a href="#">Update Employee Account</a>	Accounts	Update an employee's account
<a href="#">Update My Account</a>	Accounts	Update my account
<a href="#">View My Administrators</a>	Accounts	View My Administrators

1 - 14 of 14

**Back**

5. Click **Promote Delegated Administrator**.  
*Form Detail* screen displays.

**Form Detail**


**Delegated Admin Info:**

DA of Organization(s): None  
 DA of Division(s): CJLEADS  
 DA of Section(s): None

Enter search criteria in the boxes below then click the search icon.

**User Search Criteria**

Last Name:    
 First Name:    
 User ID:    
 Email:    
 Beacon No.:


Click to Search: 

Object Lookup - Windows Internet Explorer provided by OSC

Select an object from the list:

Full Name	User ID	Email	User Type	Member Of Organization	Status
John J Porter	jjporter	cynthiamitchell19@yahoo.com	State Employee	Office of the State Controller	Active

6. Search for and locate user.  
*Object Lookup* screen displays
7. Select user account to be promoted.

Click to Search: 


**User Search Result**

Full Name: John J Porter  
 UID: jjporter  
 Email: cynthiamitchell19@yahoo.com  
 Beacon ID:

If the selection for either the Organization or Division and/or Section is changed, click on "Get Roles" to retrieve the correct Roles in Organization:

Roles in Division:  
 Roles in Section:  
 Grant DA Role: \*

Office of the State Controller  
 CJLEADS  
 DA of CJLEADS

 Promote To DA Cancel

Use the **Roles in Division** and **Roles in Section** dropdown menus to return a filtered list of DA roles specific to a division and section within your organization. Select the appropriate division and section (if applicable), and click on the **Get Roles** button.

The **Grant DA Role** or **Revoke DA Role** dropdown menus will display a list of DA roles associated to the division/section that you had selected. If you need to choose a different division/section, you must re-click the **Get Roles** button to obtain the roles associated with your new selection.

8. Click **Promote to DA** button to promote user.

**Make a Process Request**

Submission was successful.  
 Your request has been submitted. To track the status of requests, view the Request Status list on the Work Dashboard.

Action: Submit Resource Request  
 Request: Promote Delegated Administrator  
 Recipient(s): Cynthia Mitchell

Back to Make a Process Request Close

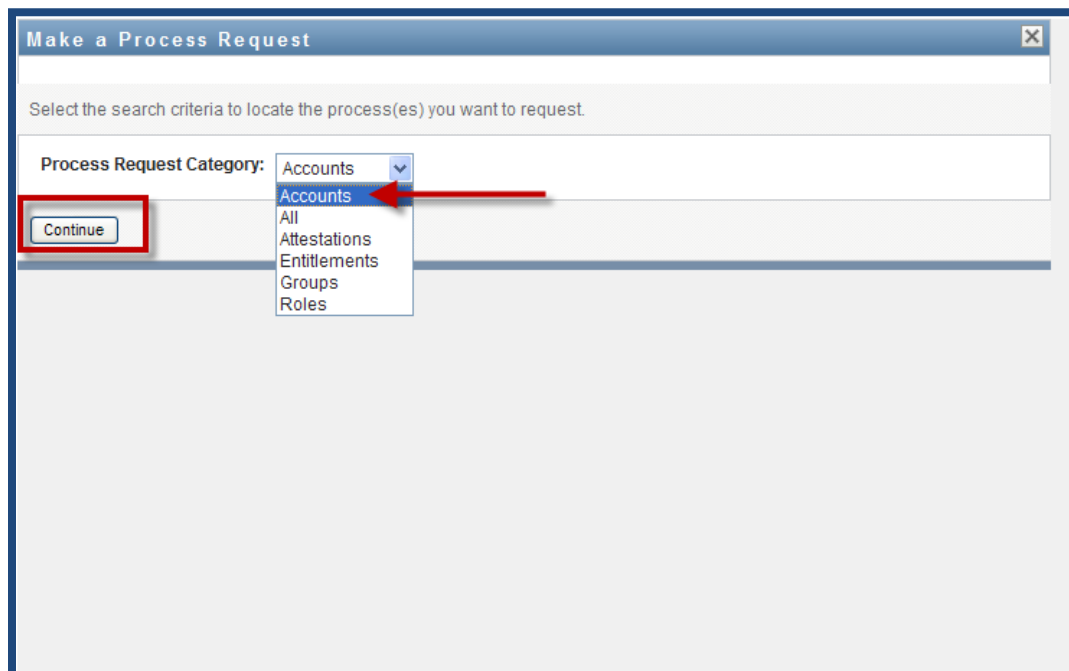
9. System confirms your request was successful.

## Demote Delegated Administrator

If a user's responsibilities change, administrator rights can be taken away by removing the administrator role(s) assigned to the user account.



1. Click **Work Dashboard** tab.
2. Click **Make a Process Request**.



3. Click **Accounts** from the **Process Request Category** dropdown menu.

4. Click **Continue**.  
The *Make A Process Request* screen opens.

### Make a Process Request

Step 2 of 3: Select the process from the list.

Resource	Process Request Category	Description
<a href="#">Agency to Agency Account Transfer</a>	Accounts	Agency to Agency Account Transfer
<a href="#">Archive Employee Account</a>	Accounts	Archive an employee's account.
<a href="#">Create Employee Account</a>	Accounts	Create Employee Account
<a href="#">Deactivate Employee Account</a>	Accounts	Deactivate Employee Account
<a href="#">Demote Delegated Administrator</a>	Accounts	Demote Delegated Administrator
<a href="#">Modify Second Factor Status</a>	Accounts	Modify Second Factor Status
<a href="#">Open Application Subscription</a>	Accounts	Open Application Subscription and Unsubscription
<a href="#">Promote Delegated Administrator</a>	Accounts	Promote Delegated Administrator
<a href="#">Reactivate Employee Account</a>	Accounts	Reactivate Employee Account
<a href="#">Reset Employee Password</a>	Accounts	Reset Employee Password
<a href="#">Unlock Employee Account</a>	Accounts	Unlock an employee's account
<a href="#">Update Employee Account</a>	Accounts	Update an employee's account
<a href="#">Update My Account</a>	Accounts	Update my account
<a href="#">View My Administrators</a>	Accounts	View My Administrators

1 - 14 of 14

Click to Search:

#### User Search Result

Full Name: John J Porter  
 UID: jjporter  
 Email: cynthiamitchell19@yahoo.com  
 Beacon ID:

If the selection for either the Organization or Division and/or Section is changed, click on "Get Roles" to retrieve the correct roles.

Roles in Organization:

Roles in Division: \*

Roles in Section:

Revoke DA Role: \*

5. Click **Demote Administrator**.  
The *Form Detail* screen displays.



### Make a Process Request

Submission was successful.  
Your request has been submitted. To track the status of requests, view the Request Status list on the Work Dashboard.

**Action:** Submit Resource Request  
**Request:** Demote Delegated Administrator  
**Recipient(s):** Cynthia Mitchell

[Back to Make a Process Request](#)
[Close](#)

- System confirms your request was successful.

## Performing Agency to Agency Transfers

Performing an agency to agency transfer is a multi-step process that is performed by the employee's current administrator and the destination administrator. This process can only be performed with state employees transferring to another state agency. The agency to agency transfer cannot be performed with employees transferring between local government agencies.

**Phase 1 is performed by the current administrator:**


### NCID

Welcome Cynthia

Identity Self-Service **Work Dashboard** Roles and Resources

Task Notifications

Resource Assignments


**Cynthia Mitchell**  
cynthia.mitchell@osc.nc.gov  
919-981-2676

[Manage...](#)  
[Settings](#)

**Make a Process Request**

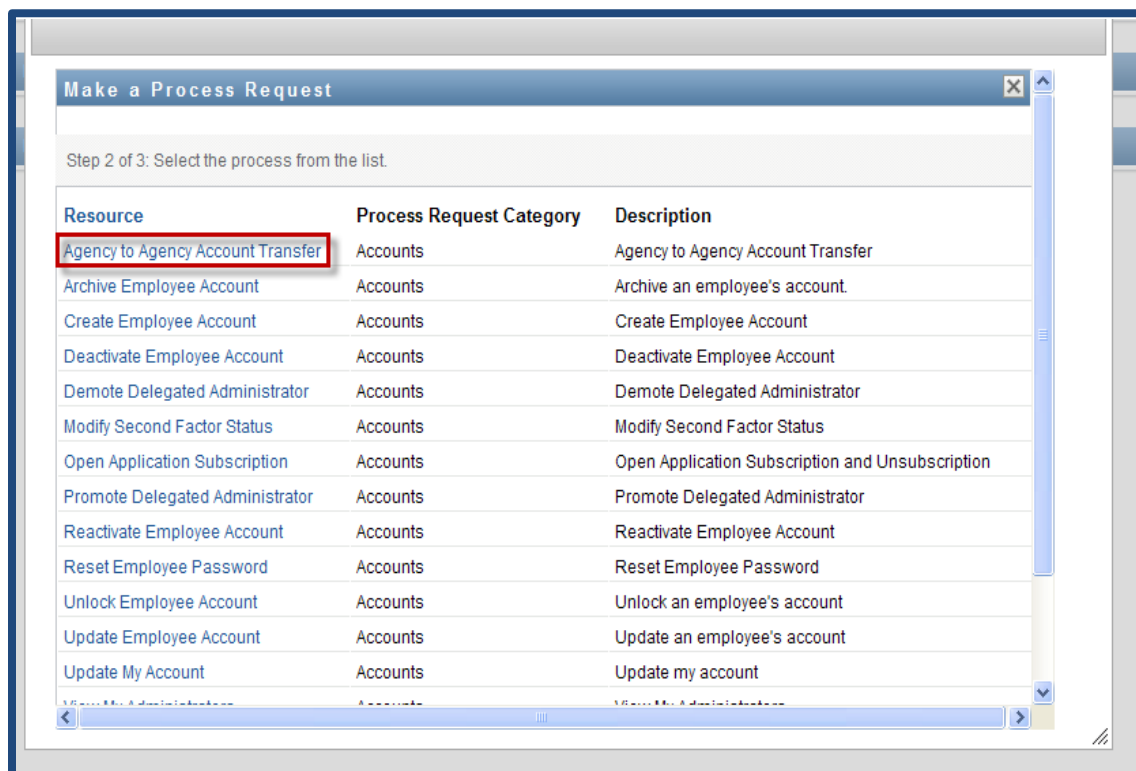
#### Make a Process Request

Select the search criteria to locate the process(es) you want to request.

Process Request Category: **All**

[Continue](#)

1. On the **Work Dashboard** tab, click on the **Make a Process Request** button.
2. Click **Continue** to view a list of workflow processes and select **Agency to Agency Account Transfer**.

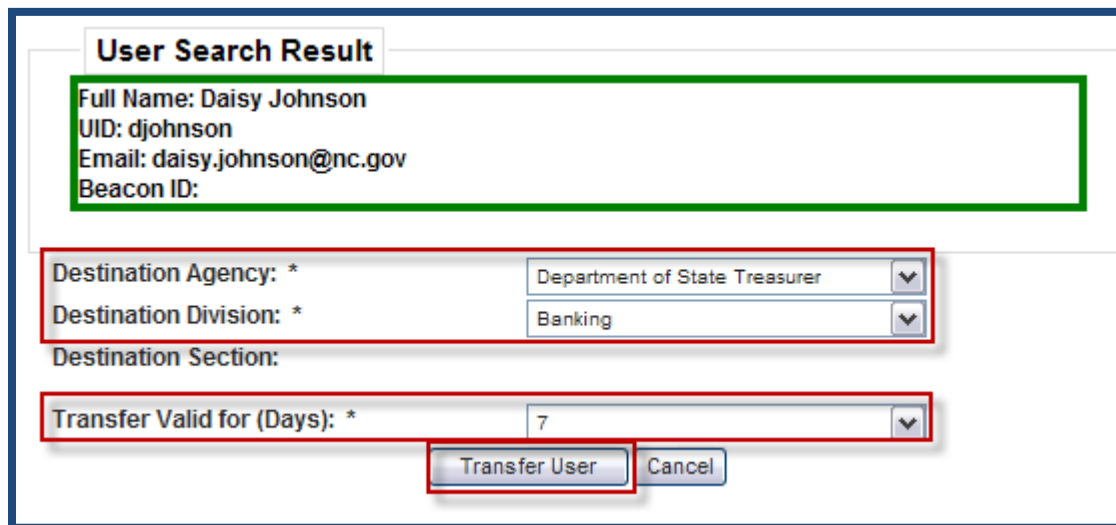


Make a Process Request

Step 2 of 3: Select the process from the list.

Resource	Process Request Category	Description
<b>Agency to Agency Account Transfer</b>	Accounts	Agency to Agency Account Transfer
Archive Employee Account	Accounts	Archive an employee's account.
Create Employee Account	Accounts	Create Employee Account
Deactivate Employee Account	Accounts	Deactivate Employee Account
Demote Delegated Administrator	Accounts	Demote Delegated Administrator
Modify Second Factor Status	Accounts	Modify Second Factor Status
Open Application Subscription	Accounts	Open Application Subscription and Unsubscription
Promote Delegated Administrator	Accounts	Promote Delegated Administrator
Reactivate Employee Account	Accounts	Reactivate Employee Account
Reset Employee Password	Accounts	Reset Employee Password
Unlock Employee Account	Accounts	Unlock an employee's account
Update Employee Account	Accounts	Update an employee's account
Update My Account	Accounts	Update my account
View My Account	Accounts	View My Account

3. The **Agency to Agency Account Transfer** request form is displayed.
4. Search for the employee you wish to transfer.



**User Search Result**

Full Name: Daisy Johnson  
 UID: djohnson  
 Email: daisy.johnson@nc.gov  
 Beacon ID:

Destination Agency: \* Department of State Treasurer  
 Destination Division: \* Banking  
 Destination Section:

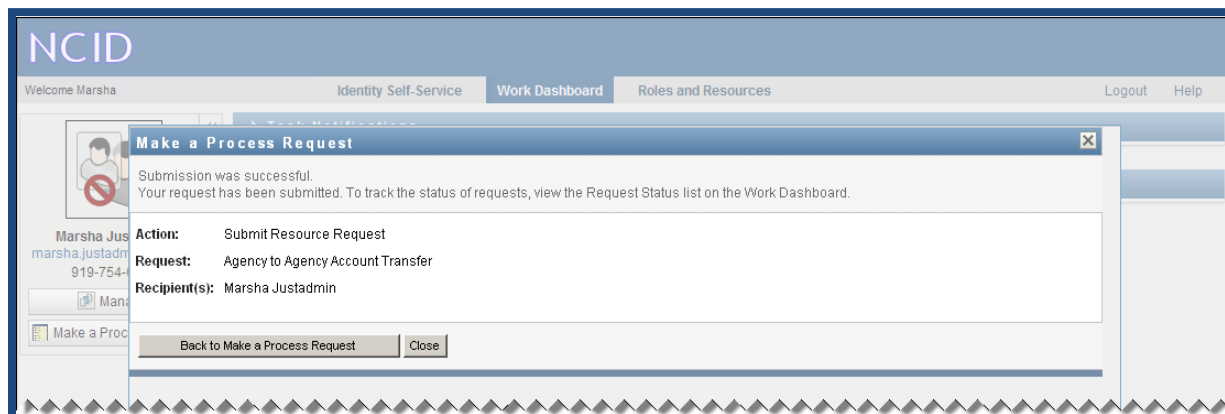
Transfer Valid for (Days): \* 7

Transfer User Cancel

5. Select the agency, division (and section, if applicable) to which the user is transferring from the **Destination Agency**, **Destination Division**, and **Destination Section** dropdown menus. (The **Destination Section** menu is visible only if the user is moving to a division that has one or more sections.)
6. In the **Transfer Validate for (Days)** field, select the length of time required for the destination administrator approve the transfer.
7. Click the **Transfer User** button.



***If the request not approved within the specified time period, it will expire and the account will remain in the current agency. You will receive an email notification if the request expires.***



NCID

Welcome Marsha Identity Self-Service Work Dashboard Roles and Resources Logout Help

**Make a Process Request**

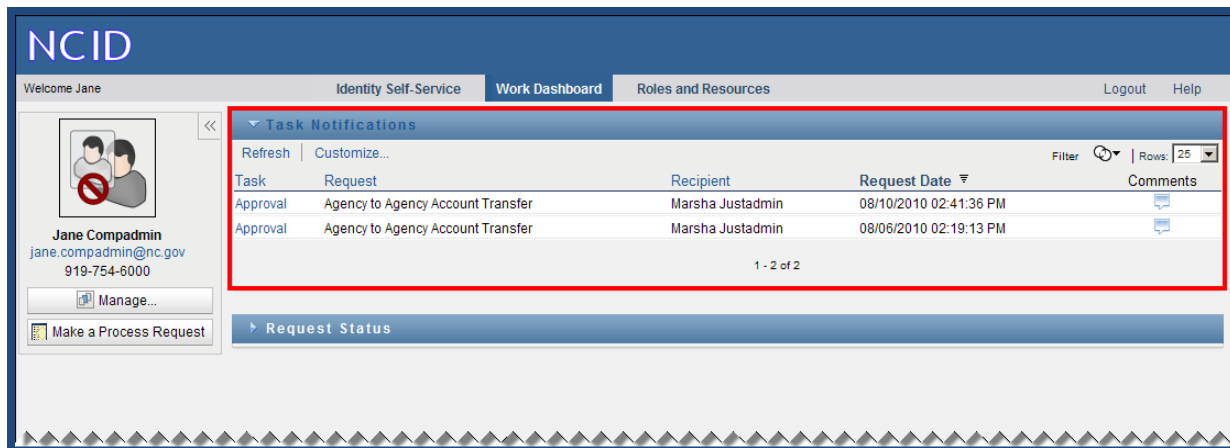
Submission was successful.  
 Your request has been submitted. To track the status of requests, view the Request Status list on the Work Dashboard.

Action: Submit Resource Request  
 Request: Agency to Agency Account Transfer  
 Recipient(s): Marsha Justadmin

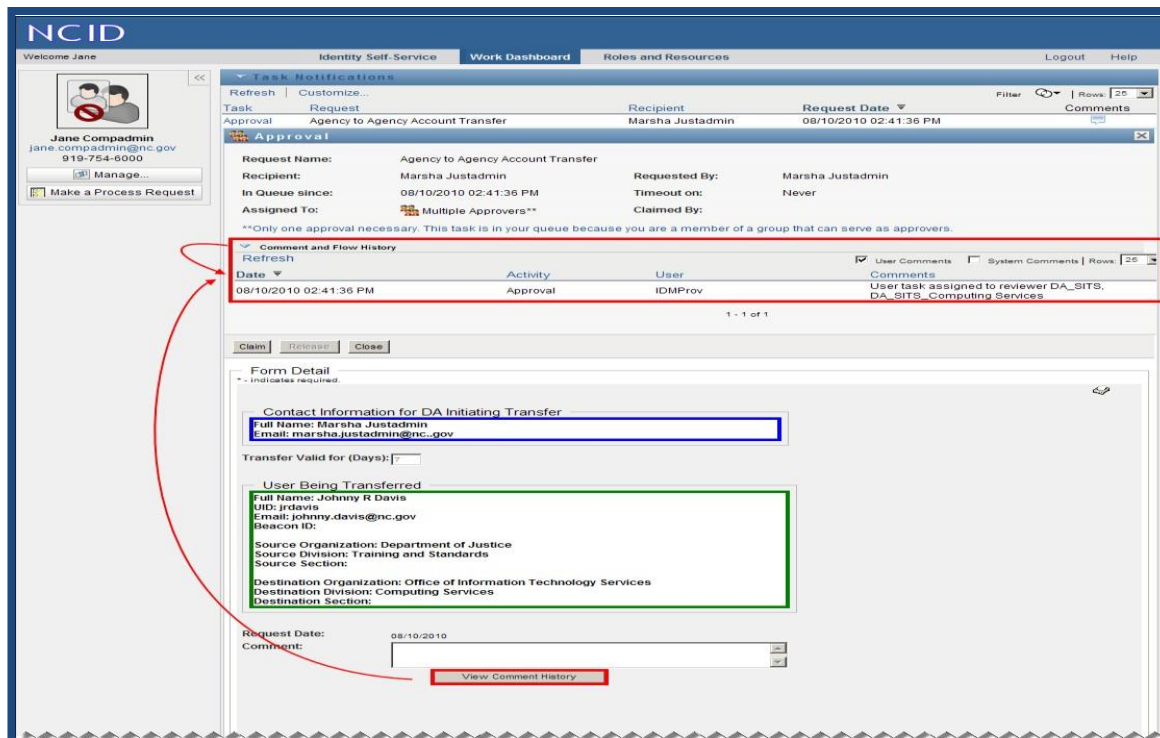
Back to Make a Process Request Close

## Phase 2 is performed by the destination administrator:

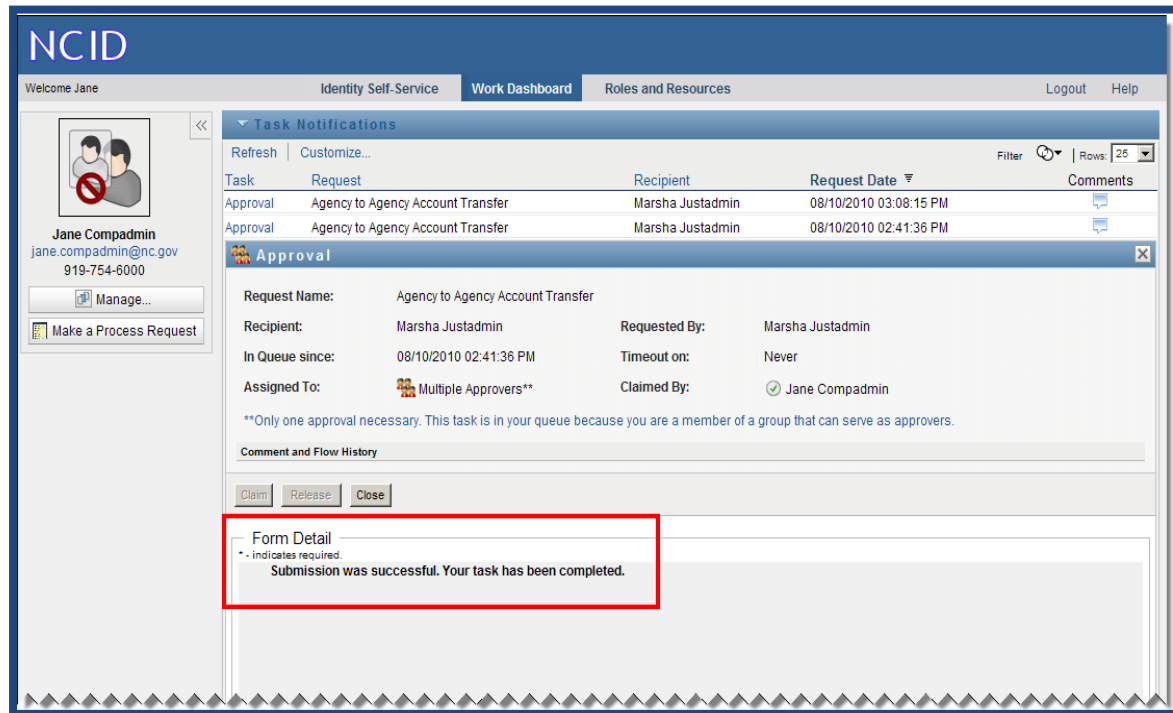
When a transfer request is submitted, the receiving administrator will receive an email notification of the employee's pending move.



1. Access the transfer request on the Work Dashboard tab.
2. Click on the icon in front of **Task Notifications**. A list of tasks is displayed.
3. Click the **Approval** button on the appropriate task to expand the line item and view details.
4. Click the **Claim** button.



If there are multiple DAs in the destination division you must first claim the task. The claim button alerts other approvers that you are granting the approval. After claiming the task, two additional action buttons are available at the bottom of the window: **Deny** and **Approve**.



**NCID**

Welcome Jane | Identity Self-Service | **Work Dashboard** | Roles and Resources | Logout | Help

**Task Notifications**

Refresh | Customize... | Filter | Rows: 25

Task	Request	Recipient	Request Date	Comments
Approval	Agency to Agency Account Transfer	Marsha Justadmin	08/10/2010 03:08:15 PM	
Approval	Agency to Agency Account Transfer	Marsha Justadmin	08/10/2010 02:41:36 PM	

**Approval**

Request Name: Agency to Agency Account Transfer

Recipient: Marsha Justadmin | Requested By: Marsha Justadmin

In Queue since: 08/10/2010 02:41:36 PM | Timeout on: Never

Assigned To: Multiple Approvers\*\* | Claimed By: Jane Compadmin

\*\*Only one approval necessary. This task is in your queue because you are a member of a group that can serve as approvers.

Comment and Flow History

Claim | Release | Close

**Form Detail**

\* - Indicates required.

Submission was successful. Your task has been completed.

- Click the **Approve** button to complete the transfer process. (Or you can cancel a request by clicking **Deny** . The employee's current administrator will receive an email notification, and the transfer is cancelled.

If you need additional assistance with performing an agency to agency transfer, please contact CJLEADS User Administration at 919-707-6949 or email [cjleadshelp@nc.gov](mailto:cjleadshelp@nc.gov).

Some information in this document was taken directly from the [NCID Administrator's Guide](#) document which is maintained by the North Carolina Office of Information Technology Services.